



Socrates GP, Service & Server Manager v2.5 Update

User Manual

March 2018

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Socrates Message

This update manual documents the updates that have been made to Socrates GP in release version 2.5. This release includes updates for Data Protection including a Patient Export to PDF facility and a TTR calculator. Also included is a PCRS Eligibility check when printing prescriptions for GMS patients together with some minor bug fixing.

Please note that Socrates GP (version 2.1.1.0) onwards is Windows 10 compatible.

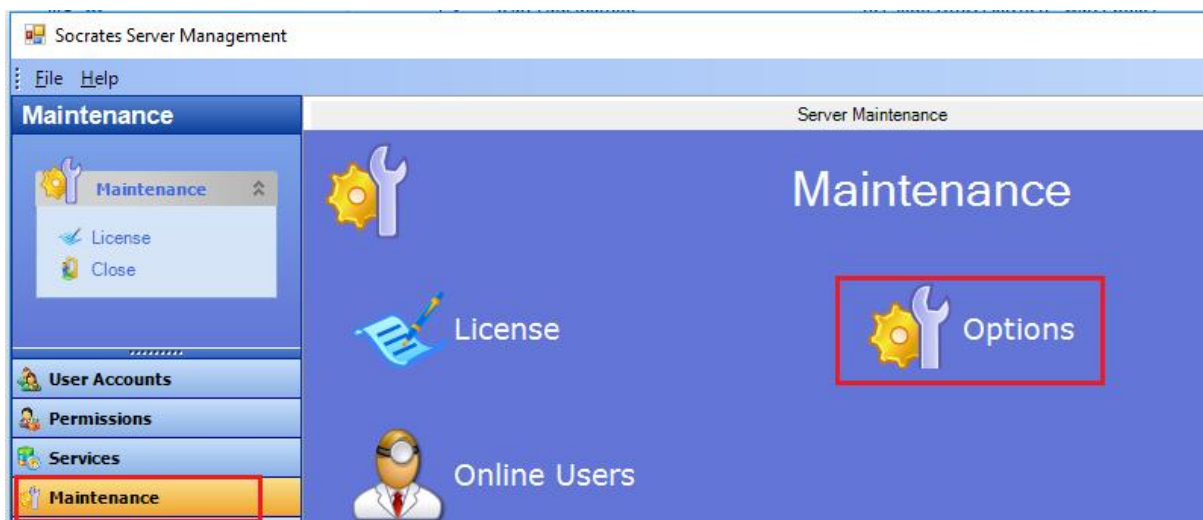
We hope you continue to enjoy using our product and we look forward to receiving your feedback.

Clanwilliam Health

1. Server Manager

1.1. Restricted Access

Access to the Server Manager can now be restricted to particular user accounts. To configure this option, log into the server manager and select Maintenance > **Options**.





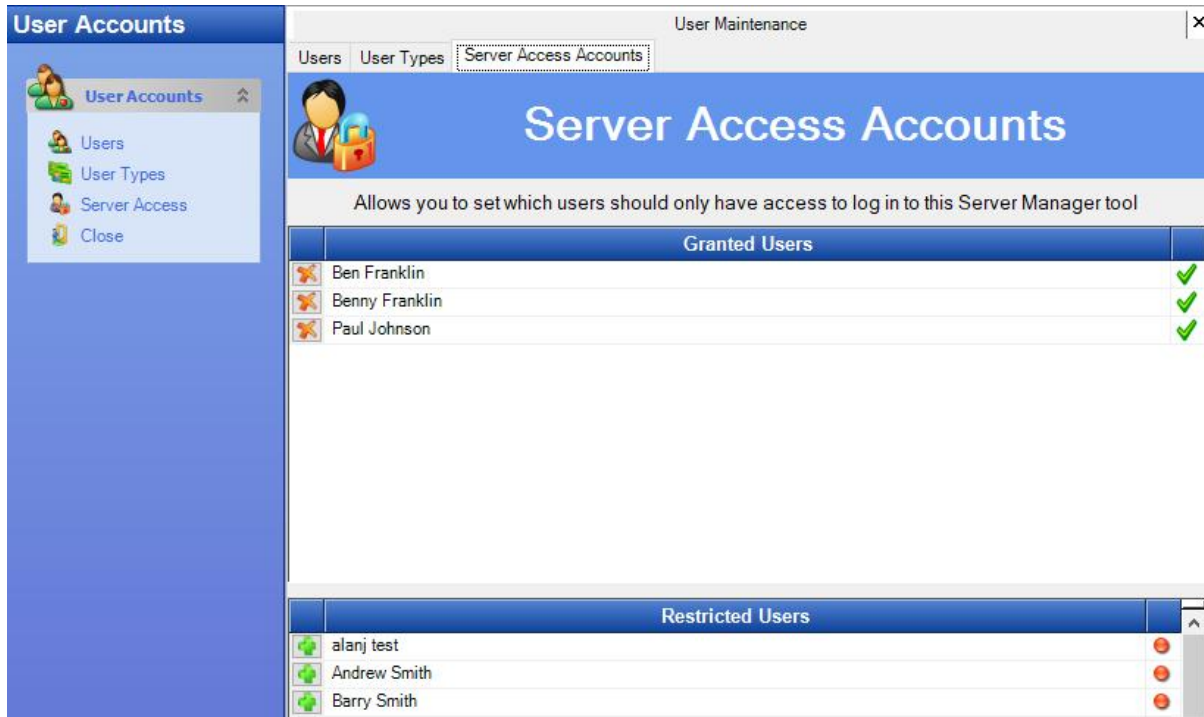
Scroll down to the **Service** options and check 'Server Access Restricted' and click **Save**.



After enabling this option click User Accounts and select the **Server Access Accounts** tab.

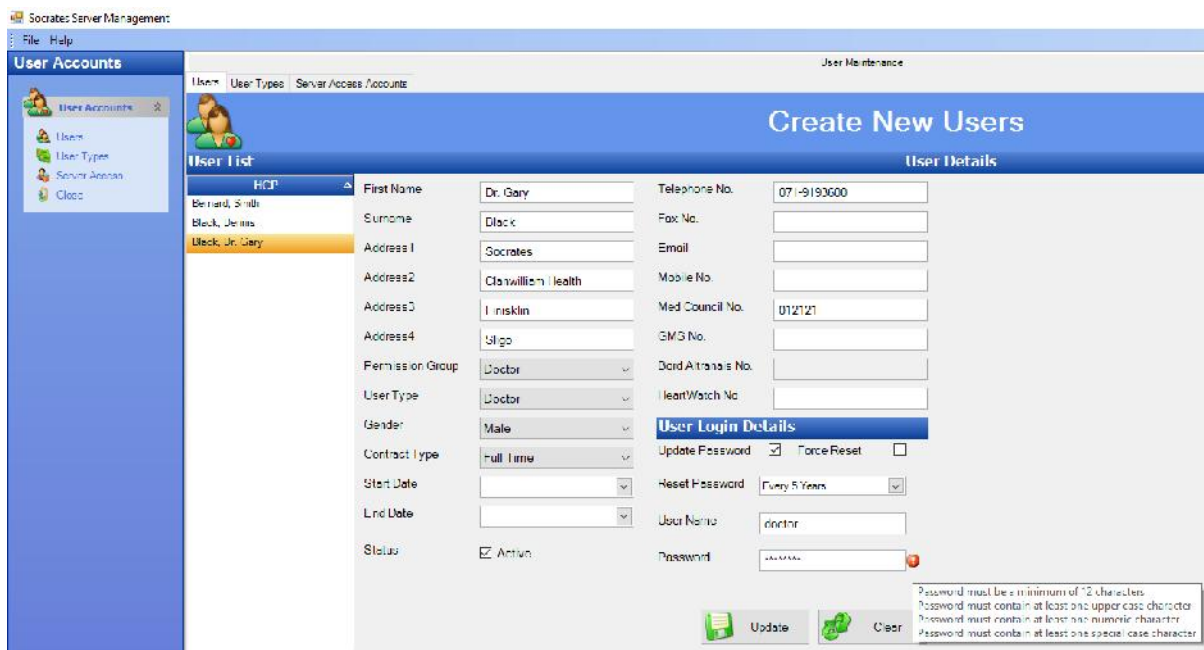


Other users can be added by clicking on the  beside their name or removed by clicking on the  beside their name.



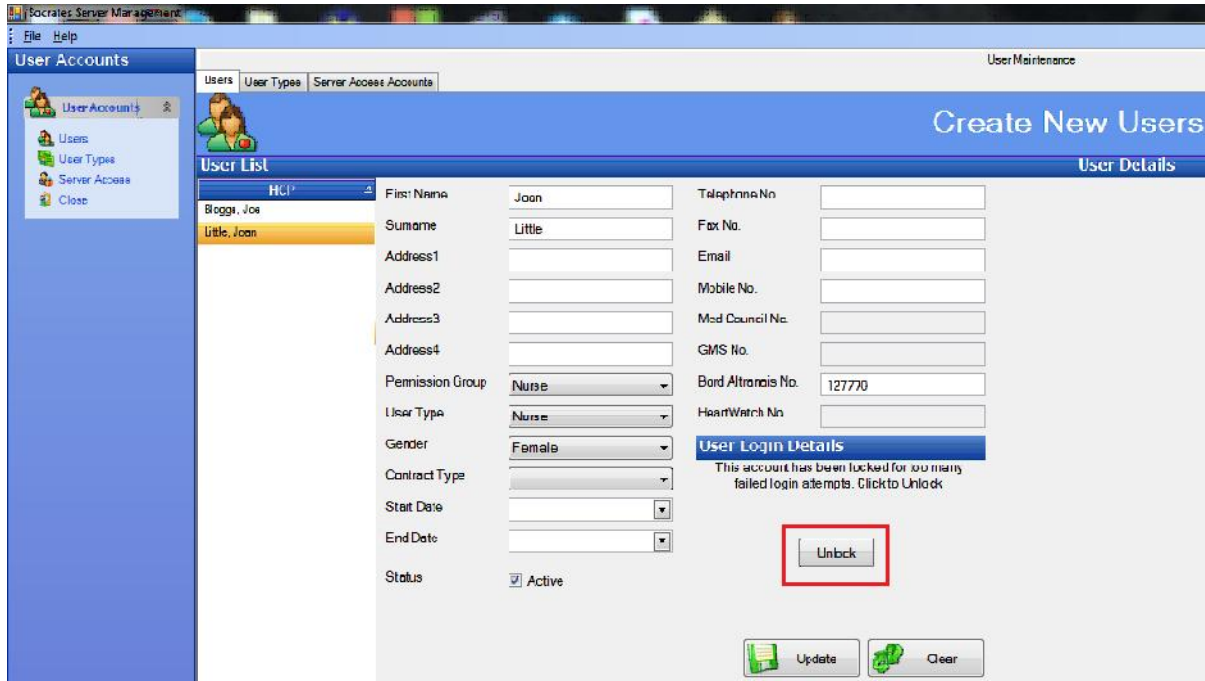
1.2. Password Complexity

In the new Server Manager (v2.5) you will also receive a prompt if the password you chose does not meet the new requirements.



1.3. Account Lockout

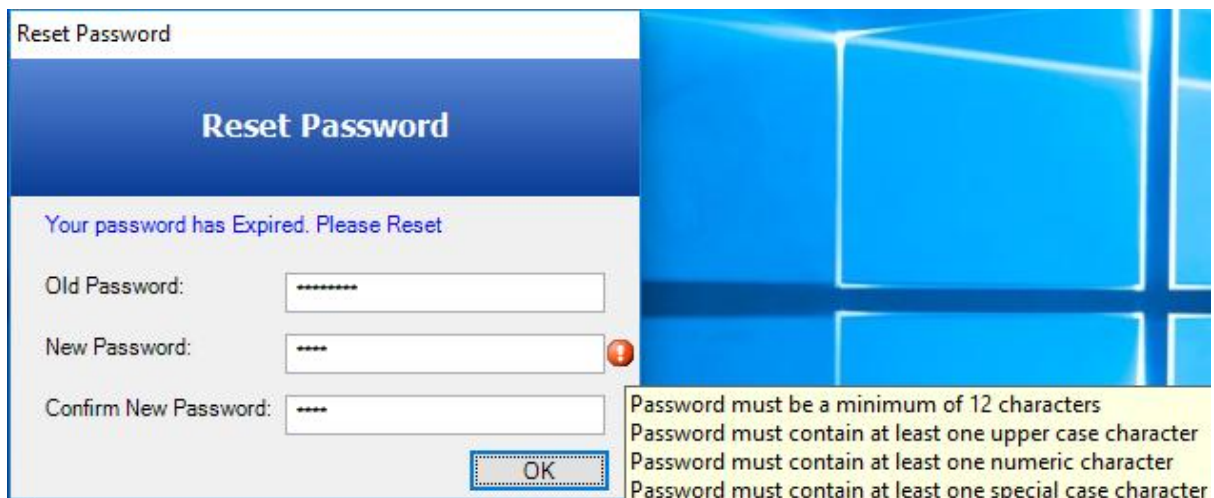
If a user locks themselves out of their account (after entering 5 incorrect passwords) click **User Accounts** and select the user. Click the **Unlock button** and you can reset their password.



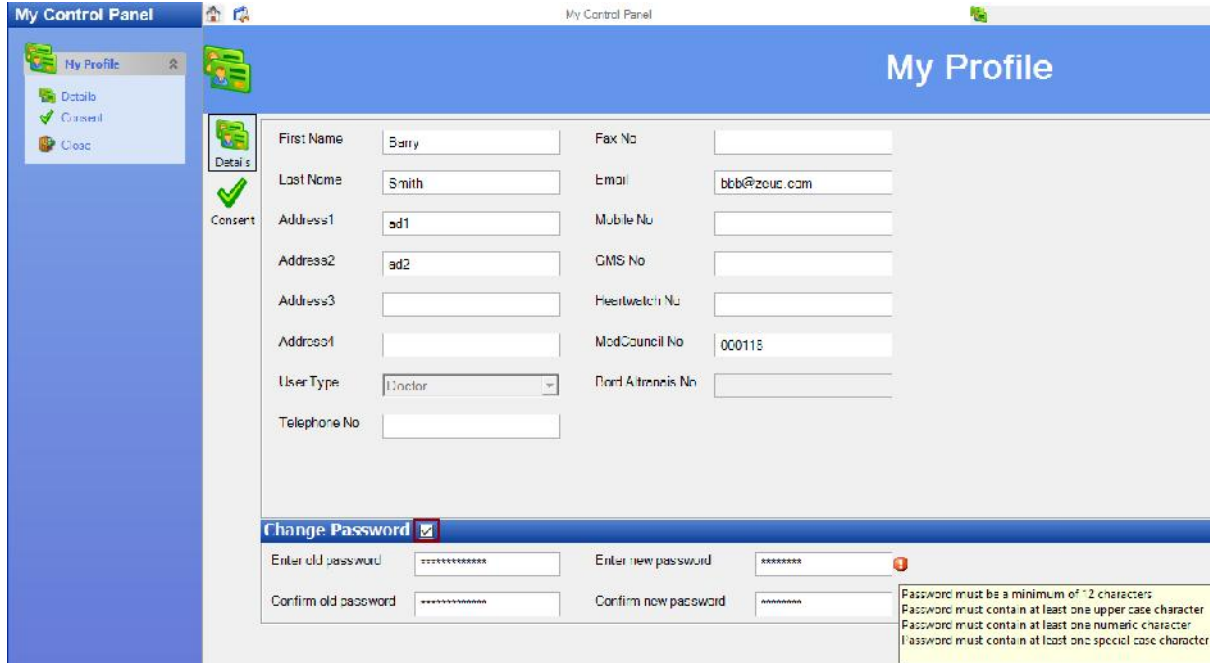
2. Login

2.1. Passwords

Password complexity has been added to Socrates. On the Reset Password window on Login, you will receive a prompt if the password you chose does not meet the new requirements.

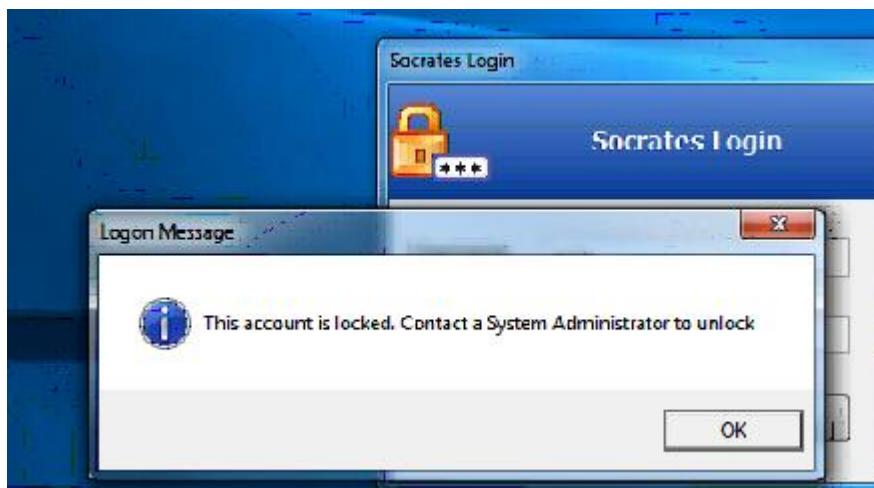


When you update your Password from My Control Panel > My Profile you will also receive a prompt if the password you chose does not meet the new requirements.



2.2. Account Lockout

If you enter an incorrect password more than 5 times your user account will be locked. You will need to request the Practice Manager to unlock your account from the Server Manager (v2.5).




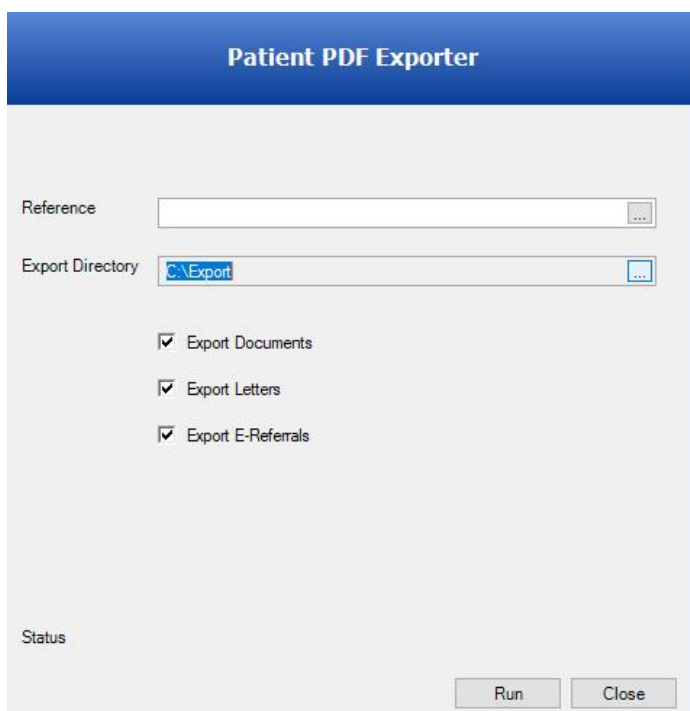
3. Patient Maintenance

3.1. Patient Export

If a patient requests a copy of their medical data use the **Patient Export** option in Patient Maintenance to generate a PDF document which contains the Medico Legal Report and the patients Documents, Letters and E-Referrals (optional).

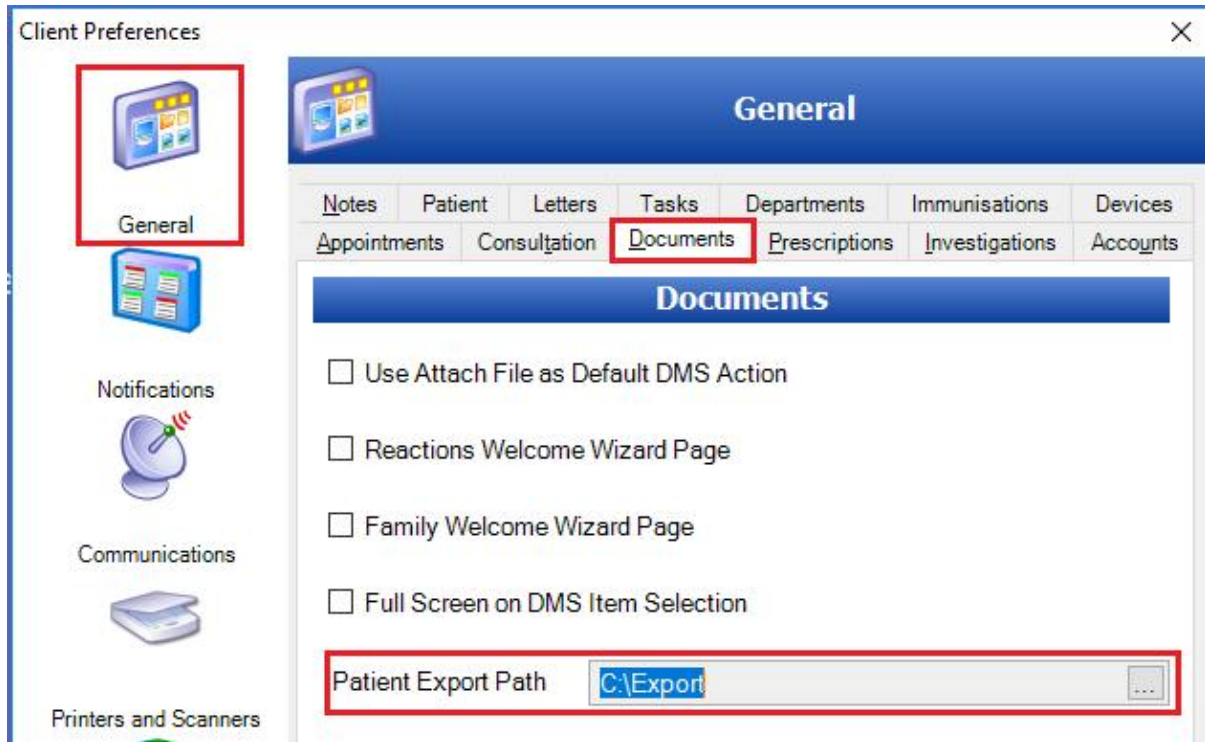


Select Patient by clicking the ellipsis button  which opens the patient search window and Select the Export Directory.



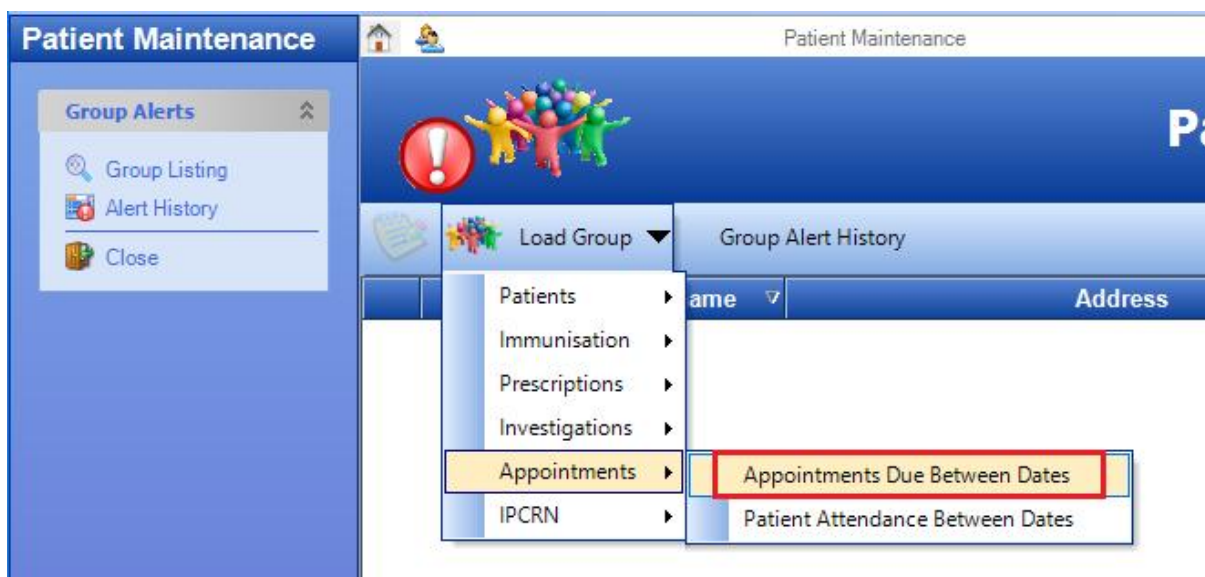
When the pdf file has been generated at the export location, it can be printed etc. Files should be deleted from the export location after use.

You can set the default export path from edit > preferences in the Documents tab of the General section.




3.2. Patient Group Alerts

Appointments Due Between Dates report has been added to Patient Group Alerts.



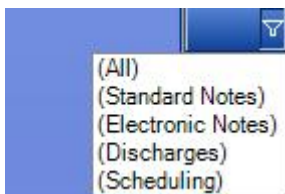
4. Consultation


4.1. Notes

Notes can now be filtered by Message Type to make it easier to find / hide electronic messages when viewing a patients' notes. Click the Filter icon  to view the filter list.

Date	Type	Note	Status	HCP
21/10/2017	Note	Social history note	Social	Tau Johnson
14/02/2016	R56	/IST=YN, acute medical condition	Active	Paul Johnson
14/02/2016	Note	free text note	None	Tau Johnson
17/10/2017	Scheduling	HL7 CPD Appointment Message Scheduling Date: 21/10/2017 10:00 Received From: AMNCH	None	Tau Johnson
27/04/2016	Discharge	CDM2 Discharge Message - Visit Date: 27/04/2016 09:30 Hospital: WELDOC - GARDNY Priority: Urgent	None	Tau Johnson



To view electronic messages (Healthlink) only select 'Electronic Notes'. Alternatively to view all notes excluding Healthlink messages select 'Standard Notes'. You can also filter by individual type of electronic message e.g. Discharges.

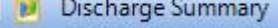


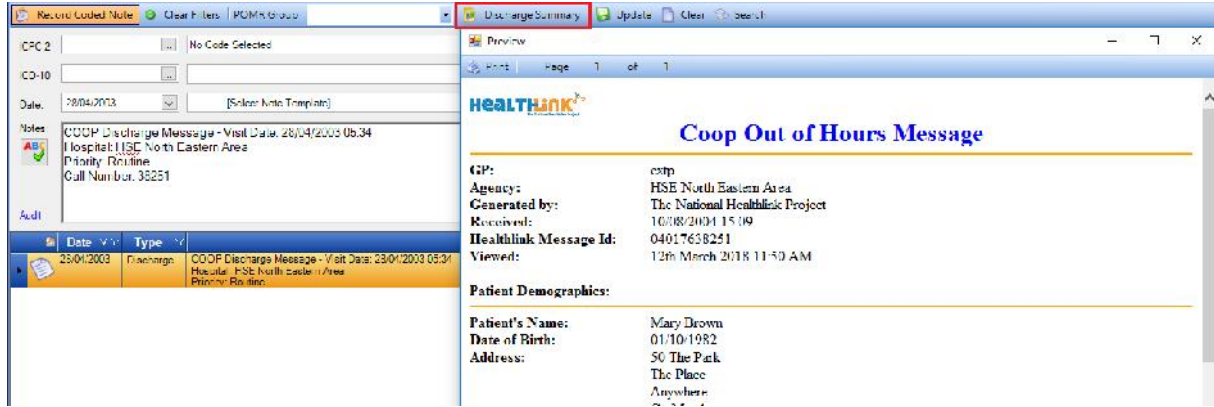
When a filter has been applied to Notes the filter icon will change to . Select the icon again and select 'ALL' to view all Notes.

Date	Type
17/10/2017	Scheduling

New icons have also been added for electronic notes based on the type of message e.g.

	17/10/2017	Scheduling
	27/04/2016	Discharge

Click the Discharge Summary button  to view the healthlink message.



4.2. Investigations

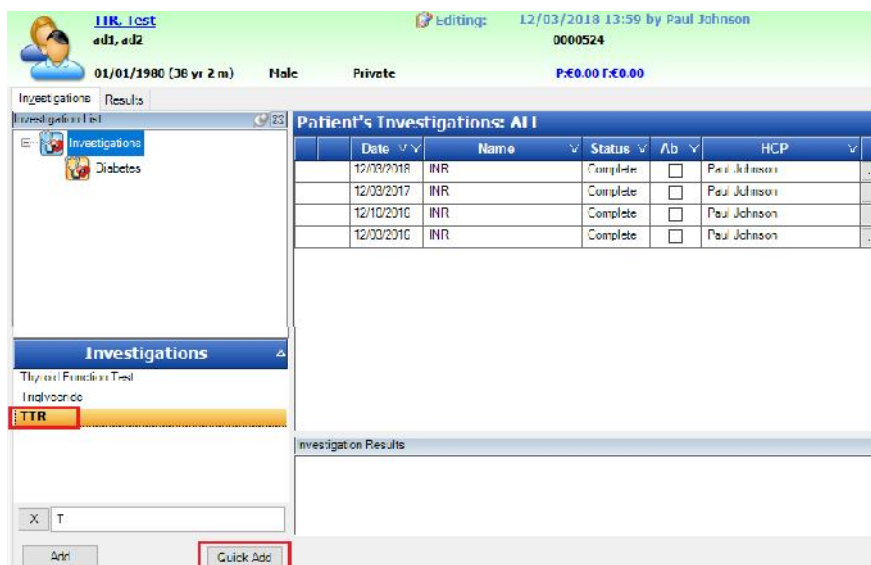
4.2.1. TTR Calculator (Health Research Board)

A TTR (Time in Therapeutic Range) calculator is now available in Socrates. The last 4 INR's are sent to the Primary Care HRB (Health Research Board) Centre in the Royal College of Surgeons (RCSI) who apply the Rosendaal method to the data & send back the TTR Score immediately to the Socrates Investigation.

No patient identifiable data is sent to the HRB. For queries please email kevinoflanagan@rcsi.ie

The TTR calculator can be configured in Control Panel > Admin Console > Investigations, See Section 6.1 of this update manual.

When the TTR calculator has been added to the TTR Investigation open the patients chart > Investigations section and add the TTR investigation.



Double click to open the TTR Investigation.

Patient's Investigations: ALL					
Date	Name	Status	Ab	HCP	
12/03/2018	TTR	Awaiting	<input type="checkbox"/>	Paul Johnson	...

Click the Calculator icon to open the TTR Calculator.



Editing: 12/03/2018 13:59 by Paul Johnson
0000574

01/01/1980 (38 yr 2 m) Male Private P:£0.00 F:£0.00

Investigations Results

Assign Task Send SMS Show Note Hide Empty Results Results - 12/03/2018 Status: Awaiting

Date	TTR	Local Item	Result	Unit	Range
12/03/2018		TTR			

Enter the Start and End Range and click the **Calculate** button.

TTR Calculator

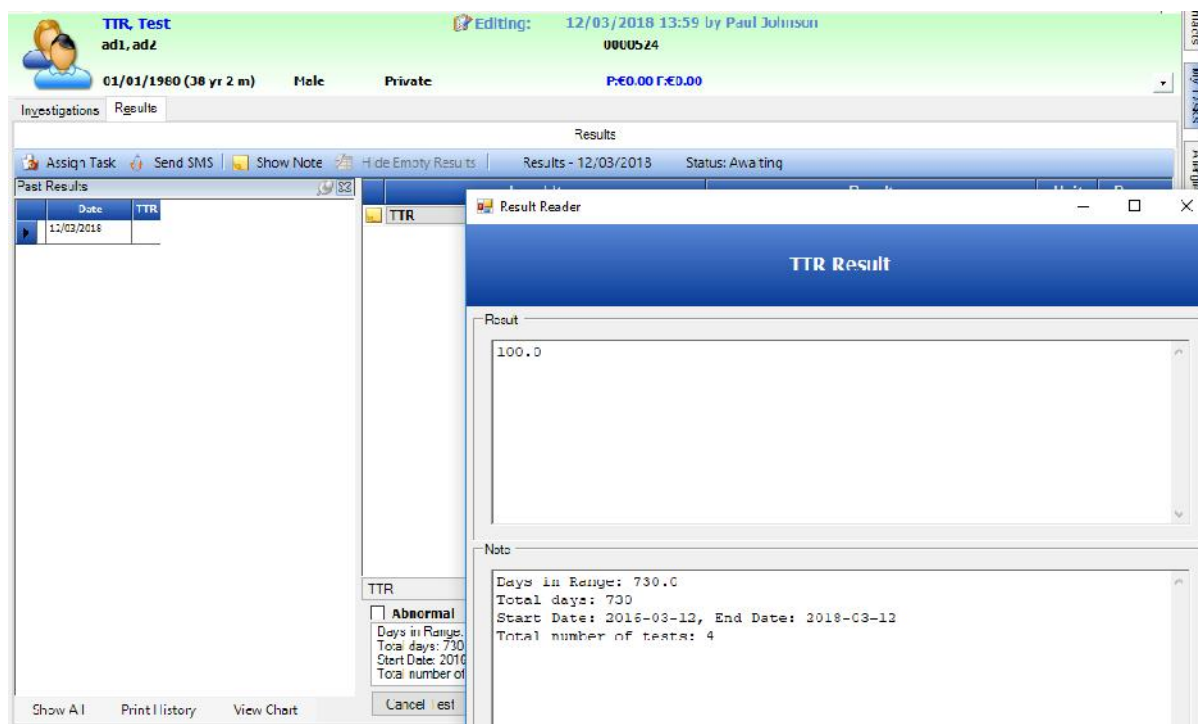
Start Range	<input type="text" value="2"/>	End Range	<input type="text" value="3"/>	<input type="button" value="Calculate"/>
Start Date	2018-01-07	Days in Range	4.2	
End Date	2018-01-28	Total Days	21	
Total Number of Tests	3	TTR Percentage	20.0	

Date	InrResult
28/01/2018	3.2
14/01/2018	3.6
07/01/2018	2.1

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Click **Save** to record the TTR in the patients chart.

Select the TTR Investigation to view the details.



4.3. Prescriptions

4.3.1. PCRS Checker

When printing prescriptions a live PCRS check will attempt to be completed for patients recorded as GMS in Socrates.

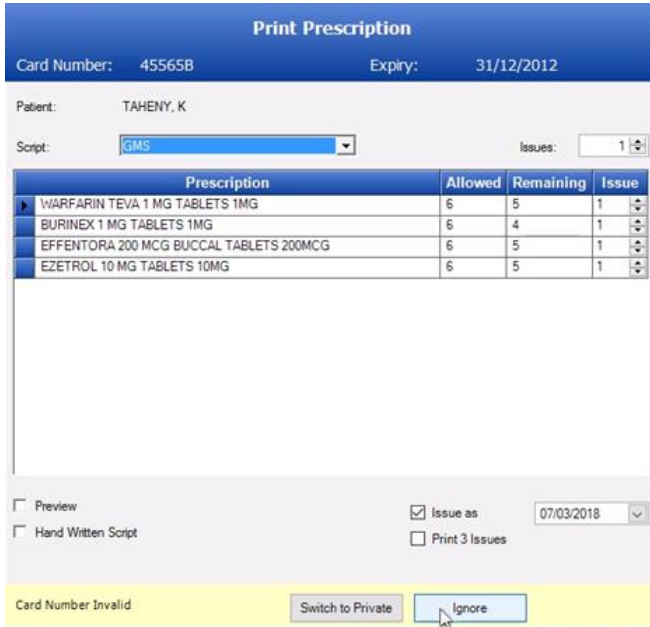
If the connection is successful and if the card is Invalid or DVC, then you will be presented with two options – ‘Switch to Private’ or ‘Ignore’.

You must select one of these options in order to print the prescription.

Notes:

1. If the GMS Card is valid and the expiry date returned is different to the one in patient registration then the new expiry date is automatically saved to the patients’ chart.
2. If the GMS Card is not valid or if it is a Doctor Visit card no changes are made to the patients record.

Clicking **Ignore** will print 'Check Validity' in the GMS Number field on the GMS Script instead of the patients GMS number.



Print Prescription

Card Number: 45565B Expiry: 31/12/2012

Patient: TAHENY, K

Script: GMS Issues: 1

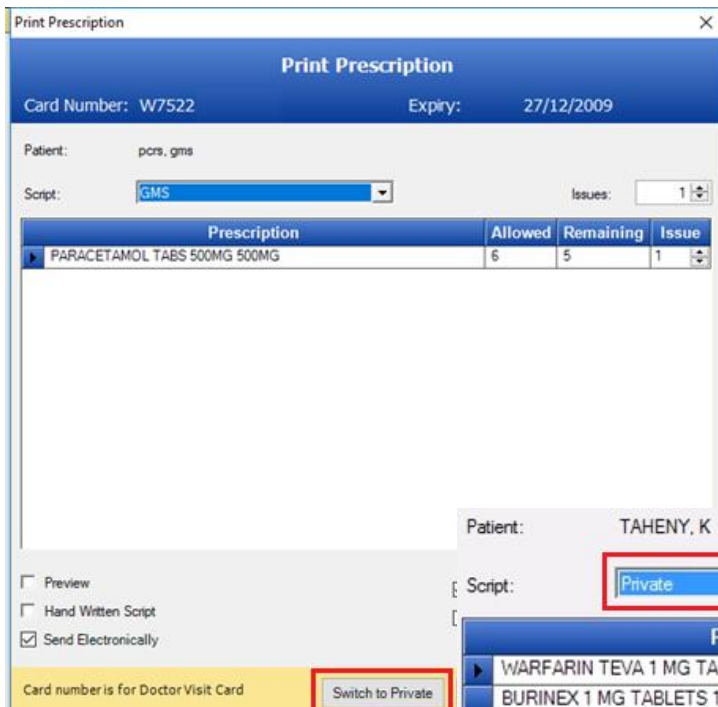
Prescription	Allowed	Remaining	Issue
WARFARIN TEVA 1 MG TABLETS 1MG	6	5	1
BURINEX 1 MG TABLETS 1MG	6	4	1
EFFENTORA 200 MCG BUCCAL TABLETS 200MCG	6	5	1
EZETROL 10 MG TABLETS 10MG	6	5	1

Preview Issue as 07/03/2018

Hand Written Script Print 3 Issues

Card Number Invalid Switch to Private Ignore

Clicking **Switch to Private** will change the Script dropdown to Private & the script will be printed on the Private Script.



Print Prescription

Card Number: W7522 Expiry: 27/12/2009

Patient: pcrs_gms

Script: GMS Issues: 1

Prescription	Allowed	Remaining	Issue
PARACETAMOL TABS 500MG 500MG	6	5	1

Preview Hand Written Script Send Electronically

Card number is for Doctor Visit Card Switch to Private



Patient: TAHENY, K

Script: Private Issues: 1

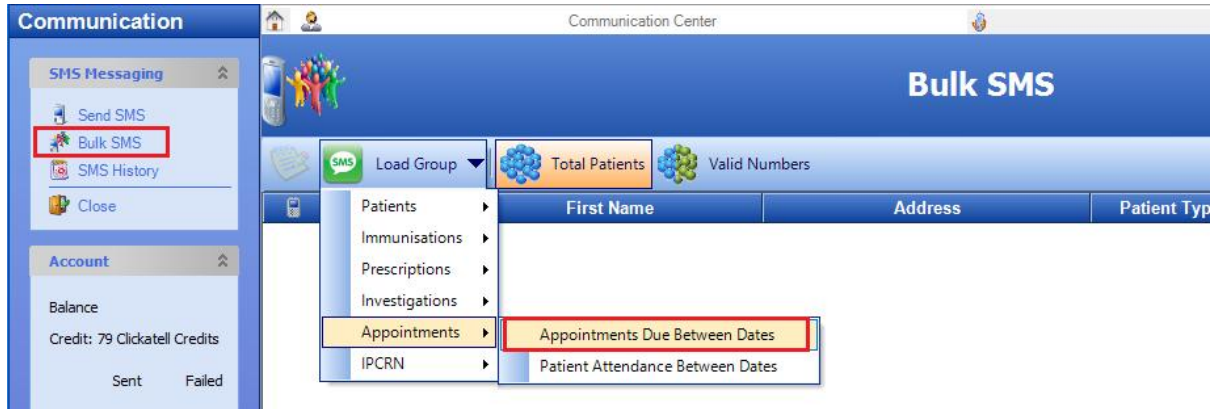
Prescription	Allowed	Remaining	Issue
WARFARIN TEVA 1 MG TABLETS 1MG	6	5	1
BURINEX 1 MG TABLETS 1MG	6	4	1
EFFENTORA 200 MCG BUCCAL TABLETS 200MCG	6	5	1
EZETROL 10 MG TABLETS 10MG	6	5	1

Switch to Private

5. Communication

5.1. SMS Messaging > Bulk SMS

Appointments Due Between Dates report has been added to Bulk SMS.



6. Control Panel

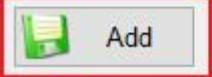

6.1. Admin Console > Investigations


- Add the TTR Calculator to a TTR Investigation.


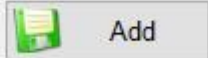
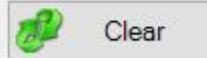
Create a new Investigation for the TTR calculator e.g. TTR and click **Add**.

Investigation Name

Active

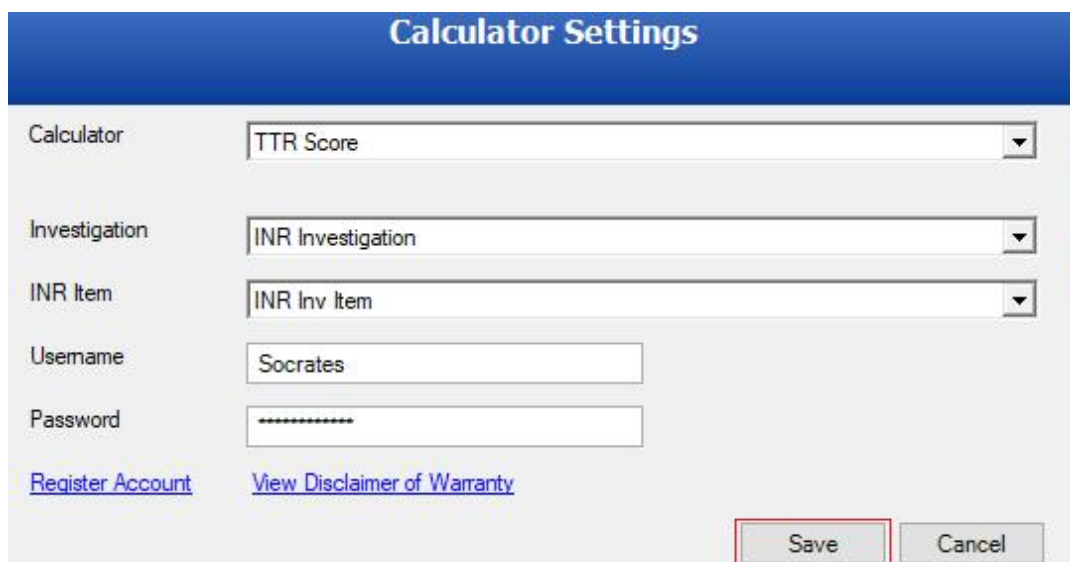
 Add  Clear

Add an Investigation Item to this Investigation called TTR with field type 'Decimal'. Select **Calculator** from the Calculated field dropdown list and click the calculator icon .

Name	<input type="text" value="TTR"/>	Absolute Minimum	<input type="text" value="0.00"/>
Description	<input type="text"/>	Absolute Maximum	<input type="text" value="0.00"/>
Field Type	Decimal	Normal Minimum	<input type="text" value="0.00"/>
Item List	<input type="text"/>	Normal Maximum	<input type="text" value="0.00"/>
Calculated	Calculator 	Unit	<input type="text"/>
Active	<input checked="" type="checkbox"/>	 Add  Clear	
Mandatory	<input type="checkbox"/>		

Select **TTR Score** in the Calculator field. Select the Investigation which contains the INR results and the INR Investigation item.

Click **Register Account** and enter the username and password you receive. Click **Save**. For queries please email kevinoflanagan@rcsi.ie.



7. Bugs / Tasks

- Physical Health Monitoring Protocol: Labels and fields in the Immunisation section are now correctly aligned.
- Cycle of Care: Imported visits are now displayed when the patients registration has been deleted & re-registered.
- Bord Altranais number can now be added / updated from My Control Panel > My Profile.
- Consultation Shortcut key for Promed (Ctrl + shift + P) was removed as this was conflicting with the payment shortcut key.
- Validation check added to test the BP Monitor and Cardio-view paths if Import ECG (Ctrl + E) or Import BP (Ctrl + Shift + M) is clicked from within the Consultation.
- SMS Appointment Alert Schedules in the Server Manager can now be deleted using the delete button on the keyboard.
- Medication aid for Cosimprel deactivated.
- Error message no longer displayed when the Antenatal Outcome Add-in is added to a letter and when patient's pregnancy has no delivery date added to the Antenatal Delivery.
- Reports listed below when run from patients chart are logged in the Audit Log for report actions.
 - Print Consultation Summary, Print All Notes, Print Selected Notes, Drug Card, Print Schedule, Print Given Shots, Heartwatch Export, Print Investigation, Print History, Pregnancy Report, MSC Report & Antenatal Claim Report.